Change of member details



Did you know that you can update your details online? Log in to Member Online at login.aware.com.au and select 'My details'.

* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

You only need to complete the sections where your details have changed.



Use this form to change your membership details or the way you receive information from the fund
Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. If you have any
questions, please contact our Member Support Team on 1300 650 873.

Step 1: Provide your current membership details

Please record your current membership details <u>before</u> you update information in Step 2 .
Account number* Member number
Title Date of birth*
First name*
Middle name
Last name*
Home address* (must not be a PO Box)
Suburb* State* Postcode*
Country* Mobile number*
Step 2: Update your information
Please select (X) which details you are updating and you must provide proof of identity if you have requested any of the following:
☐ Change your name ☐ Update your address to overseas
☐ Update your mobile number ☐ Change your bank account details
See Proof of identity in the Notes .
Title Gender
☐ Male ☐ Female ☐ Intersex or indeterminate ☐ Prefer not to say
First name
No. 1. Heave and a second seco
Middle name
Last same
Last name
Last name Date of birth D D M M Y Y Y Y
Date of birth D D M M Y Y Y Y
Date of birth
Date of birth D D M M Y Y Y Y
Date of birth D D M M Y Y Y Y Home address (must not be a PO Box)
Date of birth D D M M Y Y Y Y

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Step 2: Update your information (continued)
Country
Postal address (if different from your home address)
Suburb State Postcode
Country
Mobile number Daytime contact number
Tax File Number (TFN)
There is no requirement for you to provide your TFN and failing to do so is not an offence. However, if you do
not provide your TFN, the taxable component of any withdrawals you make from your super account before
age 60 will have tax withheld at the top marginal tax rate plus Medicare levy. Choosing to quote your TFN would also make it easier to keep track of your superannuation in the future. Under the Superannuation Industry
(Supervision) Act 1993, we are authorised to collect your TFN, which will only be used for lawful purposes. These
purposes may change in the future as a result of legislative change. Your TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN
not be disclosed.
Email (Providing a personal email address rather than a work email address ensures we can contact you even if you change
employers.)
By providing my email address I'm consenting to receive communications from Aware Super digitally as appropriate and in accordance
with Aware Super's Privacy Policy. I understand I can change my communication preferences at any time by logging into Member Online or
calling Aware Super on 1300 650 873.
Step 3: Update your bank account details
We are required to obtain and verify proof of identity before we can change your bank account details, in
accordance with the Aware Super AML/CTF Program.
• The trustee cannot be held liable for any errors that occur based on the account details you have provided.
Deposits can only be made into an account held in your name or jointly in your name.
You must provide proof of identity if you are providing the below bank details for the first time.
Account holder name/s
Branch (BSB) number Australian bank account number
Name of bank or financial institution

It isn't compulsory to provide your TFN but if you don't, you may pay additional taxes.

Branch location

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If you have selected proof of identification for electronic verification to change your name after marriage, please also include a certified copy of your Marriage certificate or Certificate of registration. See the **Notes**.

Step 4: Provide proof of identity

Please complete (X) one of the options below. ☐ I have previously provided certified proof of identity documents or provided the electronic verification information below to Aware Super and I am not changing my name, date of birth or mobile phone number, providing bank details for the first time or changing a previously nominated bank account. ☐ I will provide proof of identification for electronic verification. Please provide any TWO of the following: 1. Full name exactly as it appears on my Medicare card Valid to My Medicare number is My reference number on this card is Green Blue Select your Medicare card colour 2. Full name **exactly** as appears on my driver's licence# Licence card number Licence number State of issue Expiry date M Μ Place of birth (as shown on your passport) 3. My Australian passport number is Country of birth (not shown on your passport) Family name at birth (not shown on your passport) \sqcup I will provide original, certified proof of identity (POI) documents. For a list of POI documents and certification guidelines, refer to the Notes section. If my POI documents have not been certified correctly, I understand Aware Super may use the information on the documents to verify my identity electronically using independent data sources. # If providing your driver's licence details in this step, your driver's licence number and driver's licence card number must be provided for Aware Super to complete Proof of Identification checks for those Australian States and Territories where the card number is a mandated requirement. Visit aware.com.au/verify for further information on whether your State/Territory has this as a mandated requirement. Step 5: Change of name evidence provided If you have changed your name we must obtain and verify your previous full name and new full name against ${f certified \ copies}\ {f of \ linking \ documents \ displaying \ both \ names.}\ Please \ {f select}\ ({m \emph{X}})\ {f which \ documents \ you \ are}$ providing marriage certificate relationship certificate change of name certificate birth certificate statutory declaration linking both names and clearly outlining the intention deed poll

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Note: Ceremonial certificate is not accepted.

Step 6: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on 1300 650 873 or visit aware.com.au/privacy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

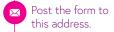
Step 7: Declaration

I certify that:

- I have fully read this form and the explanatory notes and the information completed is true and correct.
- I confirm that the information and instructions provided on this form are to replace any earlier information and instructions and that they are to remain in effect until I provide further information and instructions.
- · I authorise the use of my personal details for the purpose of electronic data verification. I understand that my information will be used to verify my identity electronically using independent data sources.
- · I acknowledge that the Fund may require additional proof of identity in certain circumstances under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.
- If I have provided my TFN, I have read and understand the TFN information within this form.
- I have read, understood and accept the Aware Super privacy policy.

Signature*			Date signed* (DD-MM-YYYY)								
Please sign and date form here.			D	D	М	М	Υ	Υ	Υ	Υ	





Step 8: Where to post your completed form

Please post the completed form to:

Aware Super GPO Box 89 **MELBOURNE VIC 3001**

In case you need any further assistance, please contact our Member Support Team on 1300 650 873.

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Notes



For more information, please refer to the Aware Super Future Saver Product Disclosure Statement (PDS) and Handbooks at aware.com.au/pds.

Proof of identity

Have you changed your name?

If you have changed your name we must obtain and verify your previous full name and new full name against **certified copies** of linking documents displaying both names, such as:

- From Birth, Death's and Marriages Registration Office:
 - marriage certificate (ceremonial certificate is not accepted)
 - relationship certificate
 - change of name certificate
 - birth certificate displaying previous names
 - statutory declaration linking both names and clearly outlining the intention

If you have reverted to your maiden name, we will require your marriage certificate, showing your maiden name and your married name.

Deed poll

Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

Proof of identity

Any change of name, correction to your date of birth, update to your mobile number or providing an overseas address we have recorded for you must be supported by **proof of identity** (POI) documentation.

Providing certified proof of your identity is a three-step process



Collect your originals

Collect your proof of identity document(s). We have listed the documents you can use below.



Photocopy your originals



Have your copies certified

Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

Either:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.[^]
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/ territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier^

Or:

One certified document from this list:

- A birth certificate issued by a state or territory of Australia, by a foreign government, or by the United Nations or an agency of the United Nations^
- A citizenship certificate issued by the Commonwealth or a foreign government[^]
- A current Centrelink pension card that entitles you to receive financial benefits

AND One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- If you're under 18, you can provide a student card, or a letter from a school principal. The letter must include the date it was issued (within three months of providing your proof of ID), your name, residential address and the dates you attended the school.

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[^] If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "Certified to be a true copy of the original seen by me", followed by their signature, printed name, address (personal or professional), qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date. In the case of a multiple page document, the authorised certifier must certify all pages by repeating the above steps on each page and including the numbering of each page (1 of 25).

If you are in Australia

The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at **www.ag.gov.au**.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- · financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- · legal practitioner
- · magistrate
- · medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- · veterinary surgeon

Samantha Sample has provided a copy of her identification. It includes her signature, full name, date of birth and current residential address.

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



Certified to be a true copy of the original seen by me.

K Anderson

Name: Kate Anderson

Address: 6 Some St Suburb NSW 2000

Qualification: JP Registration no: 123456 Date: 1 March 2023

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If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

Overseas residents

If you change your address to an overseas address, reside overseas or direct Aware Super to make your payment to an overseas address, you must provide verification proof.

What proof of identity information must be provided?

A passport issued by the Commonwealth,

OR

A passport or a similar document issued for the purpose of international travel, that:

- a. contains a photograph and the signature of the person in whose name the document is issued
- b. is issued by a foreign government, the United Nations or an agency of the United Nations, and
- c. if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

AND

one of the following:

- a. a licence or permit issued under the law or equivalent authority
 of a foreign country for the purpose of driving a vehicle that
 contains a photograph of the person in whose name the
 document is issued and contains their residential address, or
- b. a notice that:
 - was issued to an individual by a local government body or utilities provider within the preceding three months
 - contains the name of the individual and his or her residential address, and
 - records the provision of services by that local government body or utilities provider to that address or to that person.

What happens if I do not quote my TFN?

There is no requirement for you to provide your TFN and failing to do so is not an offence. However, if you do not provide your TFN, the taxable component of any withdrawals you make from your super account before age 60 will have tax withheld at the top marginal tax rate plus Medicare levy. In addition, if you have made concessional contributions to your account the tax rate equivalent to the top marginal tax rate plus Medicare levy will apply. If we do not have your TFN, you will not be able to make personal contributions to your superannuation account. Choosing to quote your TFN would also make it easier to keep track of your superannuation in the future. Under the Superannuation Industry (Supervision) Act 1993, we are authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

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